Quick Reference Guide:

Beginning of Year Verification

This guide explains the basic process for verifying 2016-17 calendars and enrolling students into schools for the 2016-17 school year.

(Some of this may have been done at the end of the previous year.)

Topics covered in this Quick Reference Guide include:

- Verifying 2016-17 Calendars
- Summer Transfers & Graduates
- 2016-17 Enrollments
- Records Transfer
- Data Verification
- Resync State Data



More Information:

AIM New User Guide

MT Programs - Job Corps & MTDA

MT Programs - Youth ChalleNGe

<u>Creating Households</u>

The Beginning of Year Verification establishes calendars and enrollments for the 2016-17 school year. Schools are required to enroll all students in AIM who attend at least one day of class or who receive Special Education services from the district.



Before beginning, consider the following:

1. What data is entered on the Calendar?

 Calendars need a Start and End Date for the District school year, a Calendar Number, the correct grade levels for the school, and the student Start and End Dates. page 2

2. How do I properly exit students who transferred over the summer?

• Delete the student's 2016-17 enrollment and update the 2015-16 End Status to reflect the transfer. page 3

3. How do I record Summer Graduates?

 Summer graduates are recorded like regular graduates – change the 2015-16 enrollment End Status to 400:
 Graduated, and enter Diploma Date, Diploma Type and Diploma Period. page 4

4. How do I get State IDs for new students?

 Obtain State IDs from the student's prior district or from the Student Locator. Districts may upload a Student Demographic file to locate State IDs, however, using the Student Locator reduces the potential for duplication. pages 7-8

5. What are the correct Enrollment Start Status codes for students?

• Start Status codes should accurately reflect the prior enrollment status of the student. page 9

6. Which Enrollment Service Type do I choose?

• Service Type indicates level of educational service the student is receiving from the district. *page 9*

7. How do I send/receive a Records Transfer?

 Process requests for records transfers regularly to facilitate the transfer of Special Education records and prevent enrollment overlaps. page 12

8. How do I verify the enrollment data I entered?

• The Student Information reports and Ad Hoc Reporting tools can be used to verify data entry. page 13-18





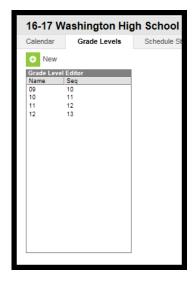
VERIFYING 2016-17 CALENDAR(S)

Choose Year 2016-17 and a School.

From the **Index**, expand **System Administration** and **Calendar**. Click **Calendar**.

Verify (and/or enter) the district *Start* and *End Dates* (fiscal year is recommended for SPED data entry). Enter "1" in the *Number* field (if you have more than one calendar per school, each calendar must have a unique number).

Click Save.

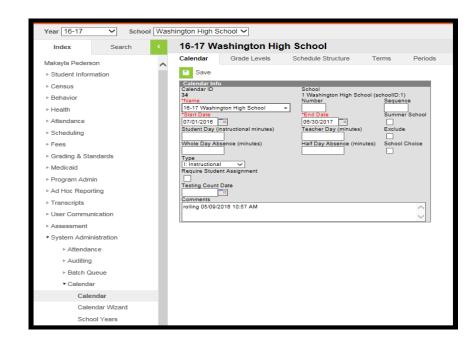


Click the **Terms** tab.

Click the name of the *Term Schedule* in the **Term Schedule/Terms Editor** box (*Full Year*). (NOTE: If no term is listed in the box, see next page.)

Under *Term Detail*, enter the student *Start* and *End Date*(s) for the *Term*. Click *Save Term Schedule/Terms*.

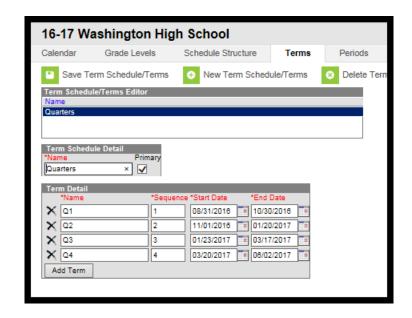
The **Periods** and **Days** tabs are optional.



Click the Grade Levels tab.

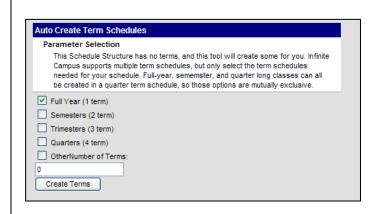
Verify the grade levels listed are valid for that school.

NOTE: Grade levels are determined by the OPI, not by the student's schedule or the district's building configuration. Changes to grade levels in a school must first be approved by the OPI.









If no term is listed in the Term Schedule/Term Editor. click New Term Schedule.

Select a Term Schedule. Click *Create Terms* (the State requires only Full Year – but if you are using the MT Edition for attendance you may need to enter more information).

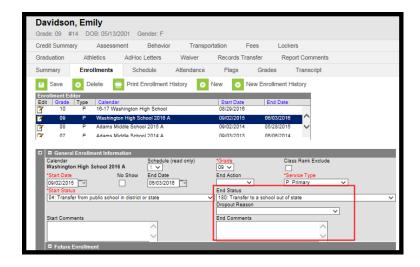
Follow the previous instructions to enter *Term* dates.

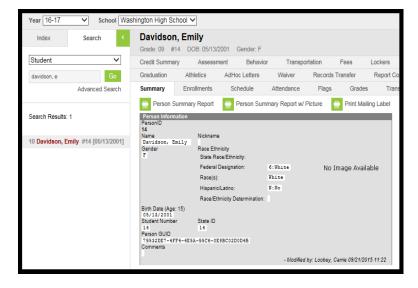
SUMMER TRANSFERS

Adjust enrollments for students who transferred out during the summer.

Example: Student was enrolled in 2015-16 and was expected to return for 2016-17. A 2016-17 enrollment record was created as part of the end-of-year process. The student moved out of state over the summer, and the school received a records request at the beginning of August.

To correct the enrollment record: Select Year 2015-16 or 2016-17 and the school. Click the **Search** tab and enter the student's last name. Click **Go**.





Amend the 2015-16 enrollment:

Select the name (appears below the Search Results), then the **Enrollments** tab.

Open the 2015-16 enrollment and change the **End Status** to 180: Transfer to a school out of state.

OPI recommends adding a note in 'End Comments' with the name of the district or school the student transferred to.

Click Save.

Delete the 2016-17 enrollment:

Open the 2016-17 enrollment and click **Delete**.







For students enrolled in grades 7-12 only:

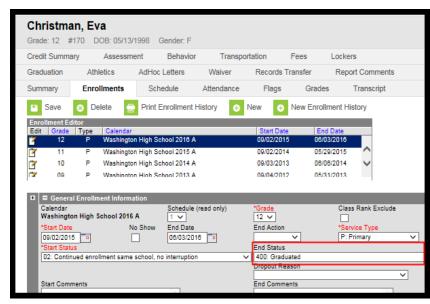
If a <u>student did not show up for school as expected in 2016-17</u> and the district has not received notice or a transfer request, create a one-day enrollment record for 2016-17 in both the district's SIS and in AIM (with *Start AND End Date* the first day of school, *End Status 340: Unknown*). Later, if the district receives notice or a transfer request, change the record as described above for a transfer student.

SUMMER GRADUATES

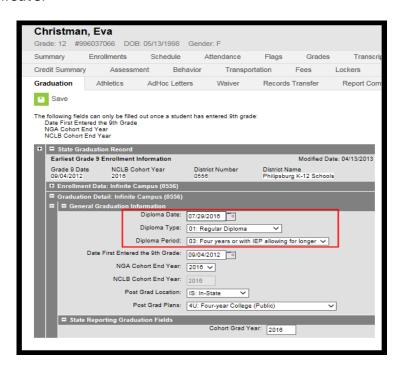
Adjust enrollments for student who completed graduation requirements after the end of the 2015-16 year, but **prior to** the first day of school in the 2016-17 year. They are counted as Summer Graduates.

Select *Year* 2015-16 and a high school. Click the **Search** tab and enter the student's last name. Click *Go*.

Click the **Enrollments** tab. Click to open the 2015-16 enrollment record. Change the *End Status* to 400: Graduated.



Click Save.



Click the **Graduation** tab.

Enter the *Diploma Date, Diploma Type* and *Diploma Period*.

Click Save.

NOTE: The Diploma Period for a student who started grade 9 in the 2012-13 year is 03: Four years or with an IEP allowing for longer if the student completes graduation requirements prior to the first day of school in the 2016-17 year.



Collection

ENTER 2016-17 ENROLLMENTS

If 2016-17 student enrollments were not previously entered during the End of Year - 2015-16 process, enter them now.

There are two ways to enter 2016-17 student enrollments: 1) Direct Entry and 2) File Upload.

The Direct Entry method requires the district to enter enrollments directly into the AIM database. Enrollments can either be rolled from the prior year, entered individually by student using the previous year enrollment, or entered using the Student Locator.

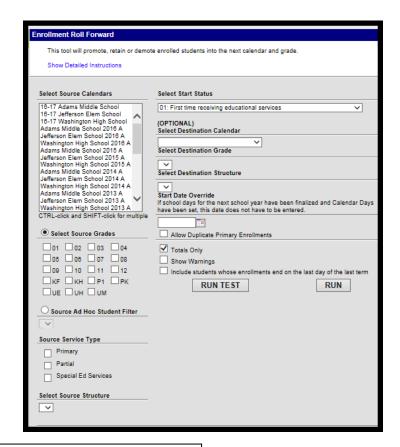
*** It is highly recommended that districts use the **Student Locator** to enroll all new students that do not have a State ID already identified.

The File Upload Method requires the district to create an upload file, either by extracting data from their existing Student Information System or from an Excel template. The <u>templates</u> are available on the OPI AIM Webpage.

Direct Entry of Enrollments (Option 1 - Rollover)

One option for direct entry of student enrollments for 2016-17 is to roll the students forward from the prior year. You may have already rolled students forward to 2016-17 during the End of Year Process for 2015-16. If not, the rollover process may still be used, even if End Dates for 2015-16 have been entered. (NOTE: If the End Dates for 2015-16 enrollments are entered before using the rollover process, check the box for "Include students whose enrollments end on the last day of the last term")

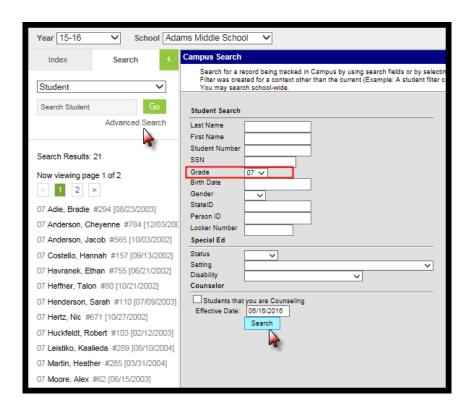
If rollover is your preferred option, see the End of Year Collection Guide for instructions.



NOTE: If you notice a duplicate student ID, contact OPIAIMHelp@mt.gov to correct the situation.







Direct Entry of Enrollments (Option 2 - Update Last Year's Enrollments)

The second option for direct entry of 2016-17 student enrollments is to use last year's enrollments to create an enrollment in the next year.

Select the 2015-16 year and a school. Click the **Search** tab, select *Student*, and *Advanced* **Search**.

Under **Student Search**, choose a grade level (e.g., start with 09). Click **Search**.

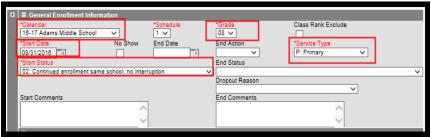
Select the first student by clicking the student's name. Click the **Enrollments** tab. Change the **Year** to 16-17 and select a school.

Click **New**. Enter the 16-17 *Start Date, Start Status, Grade Level* (for 16-17) and *Comments* (if applicable). Click **Save**.

(See <u>Start and End Status and</u> <u>Service Types - Notes</u> on page 9.)

Repeat for all students in this grade level. Start over with prior instructions for the next grade. If a student is moving from one school to another (e.g., from Elementary to Middle School), change the school after selecting the student.





Also:

- Program Participation data and Aggregate Hours may also be entered for students during this step.
 Enter the student's Absent Count on or after the Fall Count Date (October 3, 2016).
- Sort By (optional) may be entered at this time. See
 Sort By Field Notes on page 9.





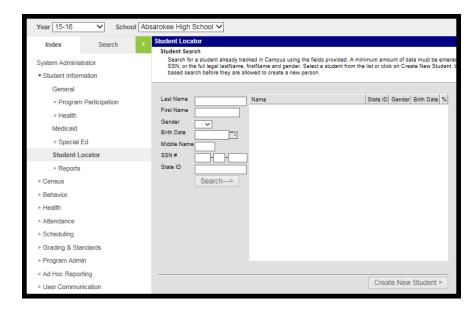
Beginning of Year Collection

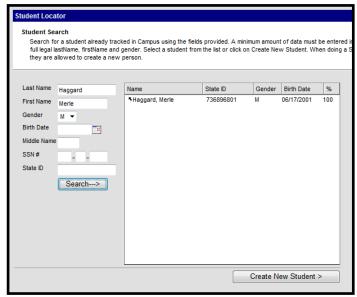
Direct Entry of Enrollments (Option 3 - Student Locator)

The third option for direct entry of 2016-17 student enrollments is to use the **Student Locator**. *This is the preferred method to locate State IDs for students who are new to the district*.

To use the **Student Locator**, set the **Year** to 2016-17 and select the correct school. From the **Index**, expand **Student Information**.

Select Student Locator.





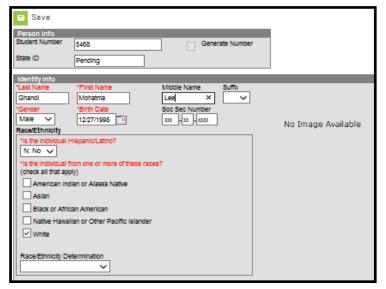
Enter the student's *Last Name*, *First Name* and *Gender*. Click *Search*.

Use the other identifiers (Name, State ID, Gender, Birth Date or % which is a wildcard search character) to help identify a match. Hover over the record to see information about the student's last enrollment.

See Student Locator-Notes on Page 8.

If the student is located, click the student's name. If the student has never been enrolled in a Montana school, the student name will not appear, so click *Create New Student*. (See Student Locator - Notes on page 8.)

Enter the *Student Number* (Local ID) – if assigned by the district. Enter the **Identity Info** and **Enrollment Detail** (see screenshot on page 8). The fields in red are required.



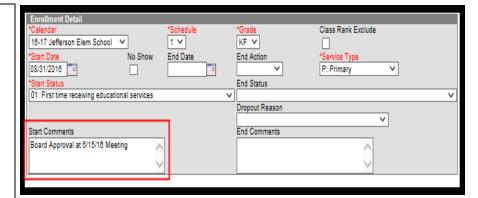


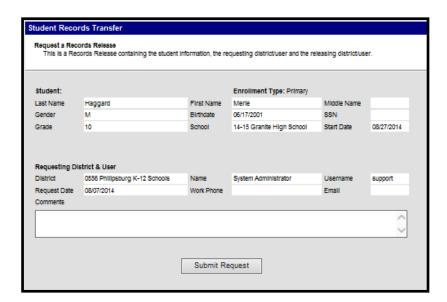


NOTE: Early Kindergarten Entries

MCA 20-7-117 requires that students who have not reached age 5 on or before
September 10 of the current school year must have special permission from the
School Board to be enrolled in a regular Kindergarten program and counted for ANB. This applies anytime during the year.

For Kindergarten enrollment under 5, please add the Board Approval Date in the Start Comments box on the student's enrollment tab.





If the student was previously enrolled in another MT district and not previously enrolled in this district, a **Student Records Transfer** request will automatically appear.

When using your personal log-in, your name and phone number (if entered on the **Demographics** tab) will appear under **Requesting District & User**. Enter comments if necessary.

Click Submit Request.

Student Locator - Notes

(Click to return to text)

A student who has an existing State ID may not show as a match in the **Student Locator** for a variety of reasons:

- Nickname versus full name (e.g., Jonathan-Johnny, Michael-Mike, Elizabeth-Liz or Beth or Libby)
- Transposed First Name/Last Name or Gender

Try a variety of options before creating a new State ID.

NOTE: If you know a student has an existing State ID but are unable to find the ID using the **Student Locator**, call the student's prior district or the **OPI AIM Helpdesk** at 1-877-424-6681.





Sort By Field - Notes

(Click to return to text)

The **Sort By** field appears at the bottom of the Enrollment tab screen for a student's enrollment record. Entering data into the **Sort By** field is <u>optional</u>.

The **Sort By** field is an additional identifier used for sorting test booklet labels (either ELP or CRT). Districts may enter any label in the **Sort By** field, such as teacher name, team name, room number, or any other sort option desired. Test labels for CRT or ELP will be sorted first by *District*, then *School*, then *Grade*, then *Sort By* field (if entered).

If you intend to use the Sort by label, it is recommended to enter the field during the enrollment process.

Start Status and Service Types - Notes

(Click to return to text)

Start Status codes should accurately reflect the last active enrollment of a student. A complete list of codes is defined in <u>Appendix A</u>. A few common examples include:

- Student was previously enrolled in a home school **Start Status** is *09: Transfer from a home school in state*.
- Student was previously enrolled in a private school in another state **Start Status** is *06: Transfer from an out of state school*.
- Use **Start Status** *01:* First time receiving educational services only if the student was never enrolled in any type of school. Kindergarten students are always *01:* First time receiving educational services, unless they were enrolled in a public school's PK program for Special Education services or they are repeating Kindergarten.

Service Types should accurately reflect the type of service the student is receiving from the school.

- P: Primary Student is enrolled in the school to receive education services
- *N: Special Ed Only* Student receives Special Education Services (PK students or students concurrently enrolled at a private or home school)
- S: Partial (Secondary) Student is primary enrolled in another school but participates in an accredited educational program at a this school





File Upload of Enrollments (Option 1 - Extract File)

The first option for using the File Upload method is to create an extract file from the district's Student Information System in the *.tsv or *.txt format.

Year 16-17

Makayla Pederson

► Behavior

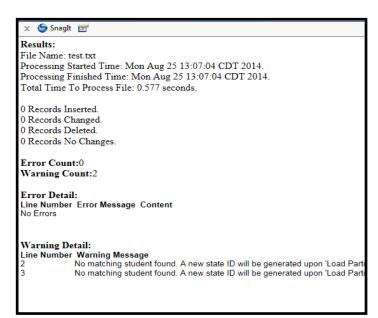
School Jefferson Elem School

Perform the Student **Demographic** file upload first, followed by the *Enrollment* file upload.

From the Index, expand MT State Reporting. Select MT Data **Upload**. From **Import Type**, select Student Demographics. Under Work to Perform, select Validate and Test File. Browse for the *.tsv or *.txt file.

Select an option under "Work To Perform" to indicate how the file should be processed. There are 2 options: 1. Validate and Test File - Only error checking will be performed on the file. A summary report will be generated identifying any errors that were found. No data is imported under this option. 2. Load Partial File - Data from the file will add to or update the current student record in the AIM system. A summary report will be generated indicating the number of records that were inserted or changed. This option should be used when updating the information on a partial list of students. ► Health In order for the uploaded data to sync to the state a batch resync must be triggered under system administration>data ► Attendance Import Options ▶ Fees Student Demographics Grading & Standards File S:\Divisions\M&A\AIM\Work Candis\SD_0558_0817201 Browse... Upload ▶ Medicaid ▶ Program Admin Submit to Batch Ad Hoc Reporting ∨ Load ▶ User Communication ► Assessment ► System Administration ▶ Point of Sale ► Surveys ▼ MT State Reporting MT Data Upload MT Extracts

Click Upload.



Repeat the process for the Student Enrollment file, choosing Index, MT Data Upload, and from Import Type select Student Enrollment.

THIS STEP IS CRITICALLY IMPORTANT!

Select an option under "Import Type" to specify which record type you are uploading. If the file you upload contains more than one type of record, (i.e. SD and EN records) select "Multiple Record Types".

Check the Import Results Summary for Errors and Warnings.

- Errors MUST be corrected before uploading.
- Warnings are messages about potential issues with uploading students - please check these thoroughly and do not load the file until all issues are addressed.
 - If Warnings state "No matching student found", see special instructions on next page before proceeding.
- When all Errors have been cleared and Warnings checked, change the Work to Perform to Load Partial File. The Import **Type** should be *Student Demographics*.
- Browse for the file and click **Upload**.





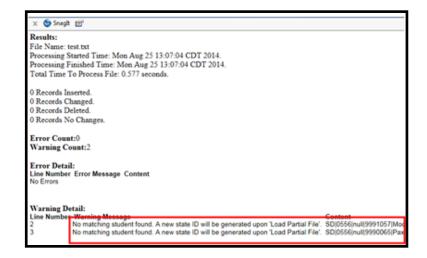
Warning - No matching student found

If the Warning Detail lists "No matching student found", AIM will create a new state ID for the student when the Student Demographics file is uploaded.

- Do not upload the Student
 Demographics file if you think
 there is already a state ID for this
 student, to avoid duplication.
 Instead, check the student locator
 to identify the ID, or call the AIM
 Helpdesk at 1-877-424-6681 for
 assistance.
- (This must be done BEFORE uploading the Student Enrollment file) If a state ID is needed, upload the Student Demographics file and save the report of new state IDs that AIM generates (instructions below). Use the file of new IDs to upload into the district local SIS, or enter the IDs manually in the local SIS.

To capture the file of new state IDs: When, after uploading the Student Demographics file (page 10), AIM displays the upload status report. The report contains a link to download the file with new IDs. **Click** Click Here.

The report shows the new state IDs. Save the file for future reference, and enter the information in the local SIS. After updating the local SIS, proceed to upload the AIM Enrollment extract (see page 10).



```
Results:
File Name: test.txt
Processing Started Time: Mon Aug 25 13:09:48 CDT 2014.
Processing Finished Time: Mon Aug 25 13:09:50 CDT 2014.
Total Time To Process File: 1.357 seconds.

2 Records Inserted.
0 Records Changed.
0 Records Changed.
0 Records Deleted.
0 Records No Changes.

The import has generated 2 new state ID. These state ID. will now be included on the appropriate extracts.
Line there to download the Student Demographics file with these new ids.
Warning Count:2

Error Detail:
Line Number Error Message Content
No Errors

Warning Detail:
Line Number Warning Message
2 No matching student found. A new state ID will be generated upon "Load Partial File". SD)0556[null]9991057]k
3 No matching student found. A new state ID will be generated upon "Load Partial File". SD)0556[null]9990065]P
```



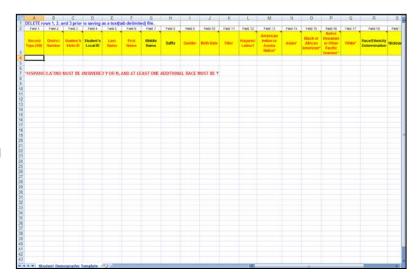




File Upload of Enrollments (Option 2 - Excel file)

Another option is to use templates to create an Excel file of enrollment data and convert it to the format needed to upload into AIM. The Student Enrollment Template and Student Demographic Template are available on the OPI AIM Webpage (templates). From the AIM Webpage, save the Student Demographic Template and Student Enrollment Template.

Open the **Student Demographic Template**. Enter the required information (shown in red) for each student.



Delete the first three rows of the file and save as a *.tsv or *.txt file. Open the *.tsv or *.txt file and insert a header row (HD *tab* date *tab* time *tab* MT9.1). Save the file.

Follow the instructions to upload the file (see Option 1 above).

HD	08/01/	2011 15:48	3:21	MT9.1					
HD SD SD SD	0280	119459608	50	Paisley	Brad			м	02/03/2004
SD	0280	125662052	68	Yearwood	d	Trisha			F 03/19/2001
SD	0280	149165791	45	Milsap	Ronnie			м	11/24/2004
SD	0280	166135951	64	William:		Hank		Эr	M 04/24/2002
SD	0280	180735107	41	Lynn	Loretta			F	12/20/2003
SD	0280	188415691	5.5	Séals	Dan			M	02/22/2006
SD	0280	193009537	12	Brooks	Garth			м	09/05/2006
SD	0280	195299033	28	Gill	vince			M	04/23/2001
SD	0280	196400321	54		Charlie			M	01/09/2002
SD	0280	210904318	17	Carter	June			F	08/10/2003
SD	0280	212117740	67	Judd	Wynonna			F	05/10/2005
SD	0280	214063709	31		Emmylou			F	10/27/2001
SD	0280	218199532	52	Pickler	Kellie			F	12/05/2005
SD	0280	223236465	37	Krauss	Alison			F	11/15/2005
SD	0280	240183925	70	Brown	Zac			м	03/10/2004
SD	0280	250939665	46	Montgome		John	Michael		M 02/12/2003
SD	0280	281099467	43	McCoÿ	Neal			м	11/27/2004
50 50 50 50 50 50 50 50 50 50 50 50 50 5	0280	282085655	15		Mariah			F	10/03/2001
SD	0280	287077795	22	Coe	David	Allen		M	10/29/2005

Repeat for the **Student Enrollment Template**.





RECORDS TRANSFER

Records transfers are only required for students who have Special Education records in the prior school district.

However, it is recommended that districts use the Records Transfer for all students who transfer into the district in order to view student enrollment histories and LEP data.

Refer to these guides on the OPI AIM Webpage at <u>AIM Reference Guides</u>

Records Transfer

Records Transfer for AIM Administrators



DATA VERIFICATION

The first step in the data verification process is to make sure the data is correct at the district level! This may involve a dialogue with specific program staff, including the Title I Director, SPED Director, lunch staff, etc.

If the data in the district's local Student Information System (SIS) is incorrect, the data in the AIM MT Edition will likely be incorrect as well.

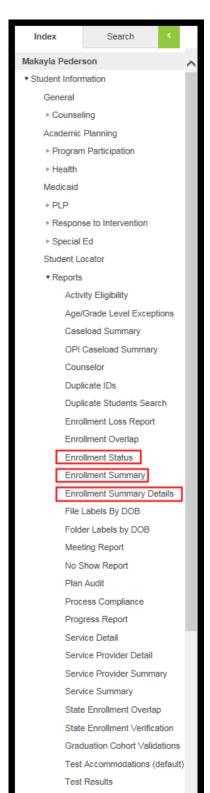
Once the enrollment data is transferred to AIM (either by direct entry or file upload), there are numerous tools in Infinite Campus to verify data, including the **Student Information Reports** (see instructions on following pages) and the **Ad Hoc Reporting** tool.

The following sections explain how to use these reports to verify data accuracy and completeness.









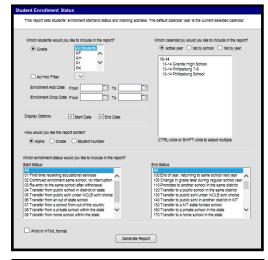
NOTE: If you discover a duplicate student ID, please contact OPI AIM Help to correct the situation.

Student Information Reports

From the Index, expand Student Information/Reports.

Many of these reports are useful for verifying enrollment data. For example:

The *Enrollment Status* report lists students by name, according to set criteria. You can choose parameters for the report.



The *Enrollment*Summary report gives a count of students by School, Grade, Race/
Ethnicity and Gender as of a specific date.



The *Enrollment Summary Details*report is a detailed version of the Summary report and offers many more filtering options to choose from.







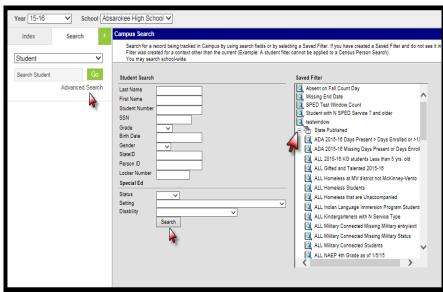
Ad Hoc Reporting

The **Ad Hoc Reporting** tool can also be used for data verification. The tool can be used in two ways: 1) Select filters to generate query reports (see our guide, <u>Ad Hoc Reporting</u>; and 2) Select from State Published (i.e., "canned") reports for checking various requirements to avoid common errors.

Run the State Published reports

Choose a *Year* and *School*. From the **Search** tab, click *Advanced Search*.

Under **Saved Filter** expand the State Published list. **Select** a report and Click **Search**.



Naming Key for State Published Ad Hoc Reports

State Published ad hoc reports are named according to the time of year and/or the collection for which they are intended:

ADA = Average Daily Attendance Collections (ADA).

ALL = Can be used any time of year.

BOY = Beginning of Year Collections

CTE = Career and Technical Education Data Collections

EOY = End of Year Collections

FALL = Fall Count Date Collections

LEP = Limited English Proficient

SPRING = Spring Count Date Collections

TW = Testing Window Count Date Collections

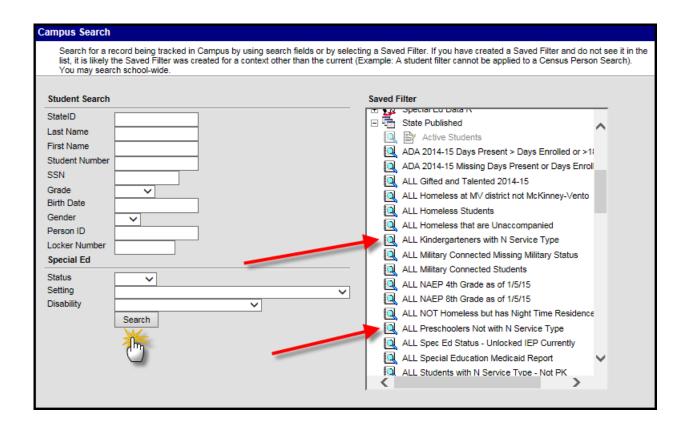




All Users should run these State Published Ad Hoc Reports:

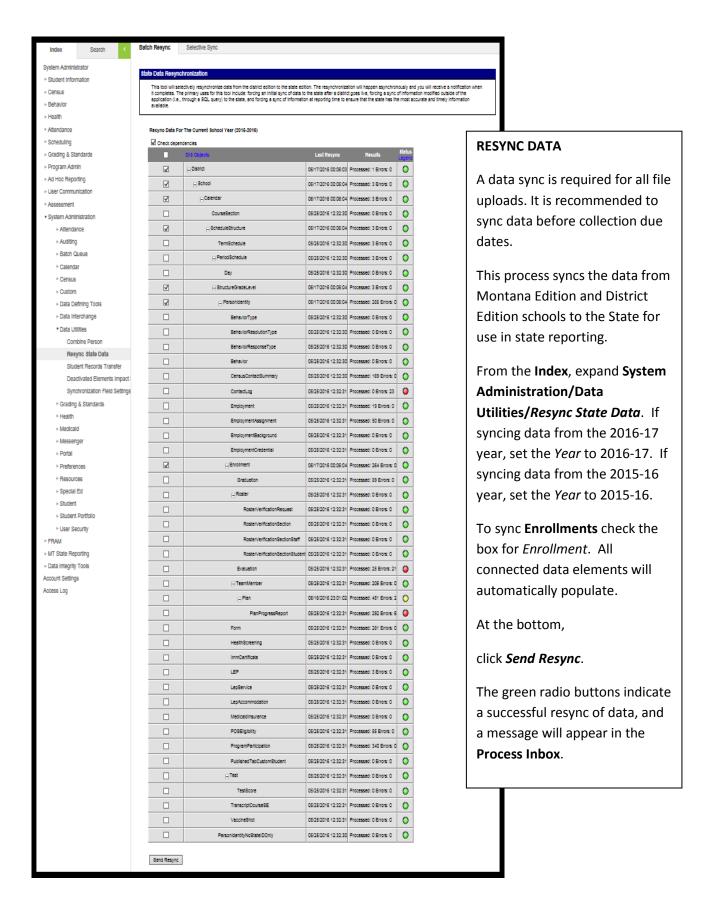
ALL Kindergartners with N Service Type - (Be sure to select *Year* 16-17) This report shows kindergarteners who have a 2016-17 enrollment with a service type of N, which signifies the student receives special education services only (i.e., no educational services). Most kindergarteners (including those with special ed services and those without special ed services) should instead have service type P (primary educational services). This error usually occurs when PK students with N service type are rolled into the new year for enrollment, carrying the N service type along. Review the report and amend the kindergarten student enrollment records as needed to change the N service type to P.

ALL Preschoolers Not with an N Service Type - (Be sure to select *Year* 16-17) This report shows preschool students who have a service type other than N. All preschoolers attending a special education preschool program should have N service type, which signifies they receive special educations services only (i.e., no educational services). Review the report and amend the preschool student enrollment records as needed to enter the N service type.



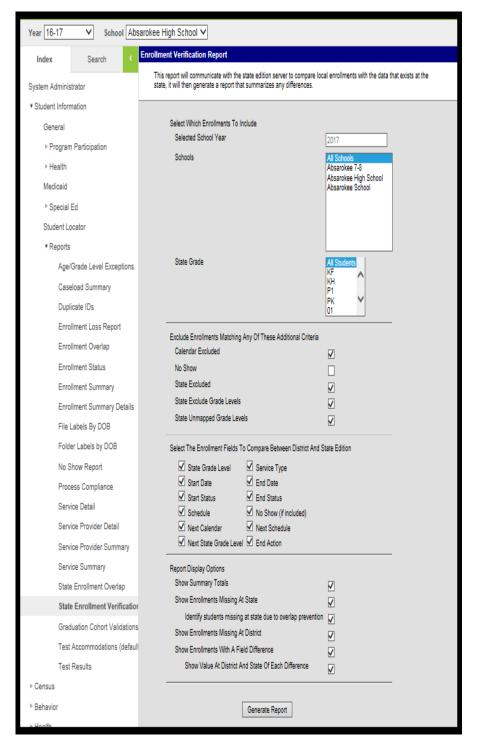












Enrollment Verification Report

After syncing enrollment data to the State, run the Enrollment Verification Report to check for differences between data entered in the MT Edition application and data that has synced to the State.

From the Index, expand Student Information/Reports. Select State Enrollment Verification.

There are a number of options and fields to choose from.
Choose the items you want to see in order to verify, and

Click Generate Report.

This report will show you differences between the District and the Sate. Attempt to fix any errors and perform another State Resync.

If differences do not resolve or you need further assistance, contact the OPI AIM Helpdesk as noted below.

For further assistance, contact the OPI AIM Helpdesk at 1-877-424-6681 or opiaimhelp@mt.gov



